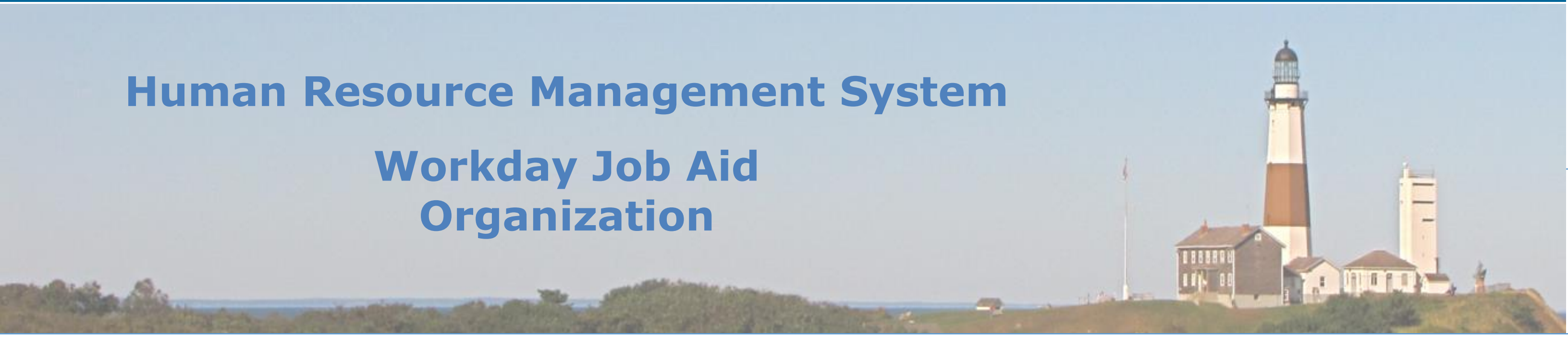
# Human Resource Management System

# Workday Job Aid
# Organization

This Job Aid describes the functionality the HR professional uses to manage the Organization entity within Workday.

- ○ Employees
- ○ People Managers
- ● Human Resources

**Contents:**





### 1. Activation

When an inactive organization needs to be activated, the following steps are performed.

Here are the steps to activate an inactive organization:

1. Enter the name of the inactive organization in the search bar.
2. Click on the result and bring up the organization.
3. Click on the related **Actions** button
4. Hover over the **Reorganization** menu item and then click on **Activate Organization**.
5. Enter the **Effective Date** if it differs from the date listed.
6. Click **OK**.
7. Click **Submit**.
8. Click **Done**.

## 2. Assign Superior

To assign a superior organization to an existing supervisory Organization, the following steps are performed.

**Note:** This task can only be performed by an **HR Administrator**.

1. Enter the name of the supervisory organization in the search bar.
2. Click on the result and bring up the organization.
3. Click on the related **Actions** button
4. Hover over the **Reorganization** menu item and then click on **Assign Superior**.
5. Enter the **Effective Date** if it differs from the date listed.
6. Click **OK**.
7. Select the **Superior Organization** to assign to the selected organization from the **Superior** prompt.
8. Click **Submit**.

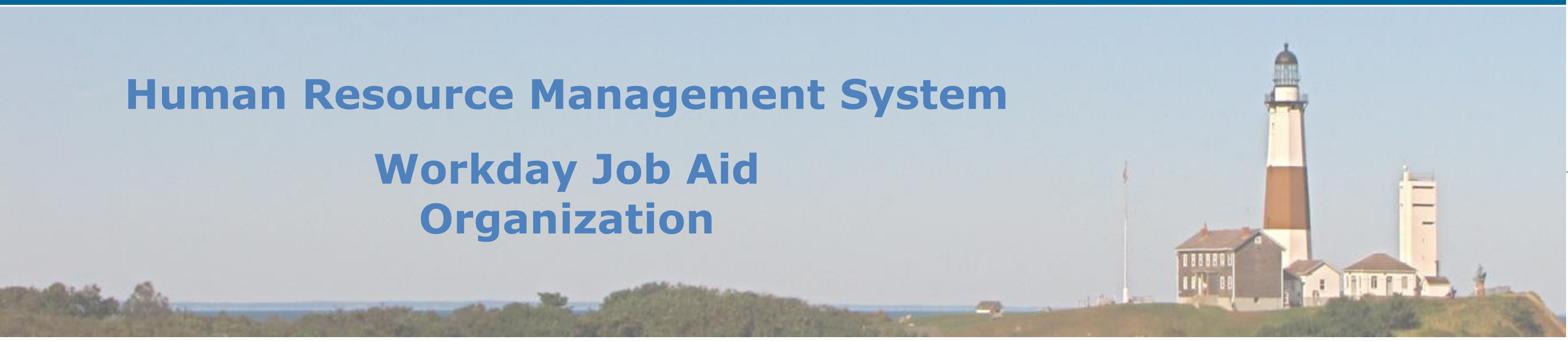
## 3. Create Subordinate

To create a subordinate supervisory organization for an existing supervisory organization, the following steps are performed.

**Note:** This task can only be performed by an **HR Administrator**.

1. Enter the name of the supervisory organization in the search bar.
2. Click on the result and bring up the organization.
3. Click on the related **Actions** button
4. Hover over the **Reorganization** menu item and then click on **Create Subordinate** or **Divide Organization**.
5. Enter the **Effective Date** if it differs from the date listed.
6. Click **OK**.
7. Fill out the form as needed (* denotes a required field).
8. Click **Submit**.

**Note**: Once submitted, this task will be routed to the Organization Manager for approval.



## 4. Divide Organization

To split an existing supervisory organization into multiple organizations, the **Divide Organization** function is used.

**Note:** This task can only be performed by an **HR Administrator**.

Here are the steps to divide an existing organization:

1. Enter the name of the supervisory organization in the search bar.
2. Click on the result and bring up the organization.
3. Click on the related **Actions** button
4. Hover over the **Reorganization** menu item and then click on **Divide Organization**.
5. Enter the **Effective Date** if it differs from the date listed.
6. Click **OK**.

**Note:** The effective date should be the earliest date that transactions will be completed in the organization.

7. Fill out the form as needed (* denotes a required field).
8. Click **Submit**.

**Note**: Once submitted, this task will be routed to the Organization Manager for approval.

## 5. Assign Organizational Assignment

There are times when changes need to be made at the supervisory organization level that trickle down to some or all of the employees that sit under that organization.

Here are the steps required to perform the **Assign Organizational Assignment** task in Workday:

1. In the Workday Search bar enter "cha org ass".
2. Click on the **Assign Organizational Assignment** task in the results returned.
3. Enter the **Effective Date** of the change.
4. Select the **Supervisory Org** from the list provided.
5. Click **OK**.
6. Fill in the appropriate fields (* indicates a required field).
7. Click **Submit**.
8. Click **Done**.

## 6. Change Organization Assignments for Worker

To change supervisory organization information for a specific employee, follow these steps:

1. Enter the name of the employee in the search bar.
2. Click on the result and bring up the employee.
3. Click on the related **Actions** button
4. Hover over the **Organization** menu item and then click on **Change Organization Assignments**.
5. Enter the **Effective Date** if it differs from the date listed.
6. Click **OK**.
7. Update the different sections as needed (* denotes a required field).
8. Click **Submit**.

## 7. Change Organization Assignments for Worker by Organization

To change supervisory organization information for a group of employees the changes are made at the supervisory organization level.

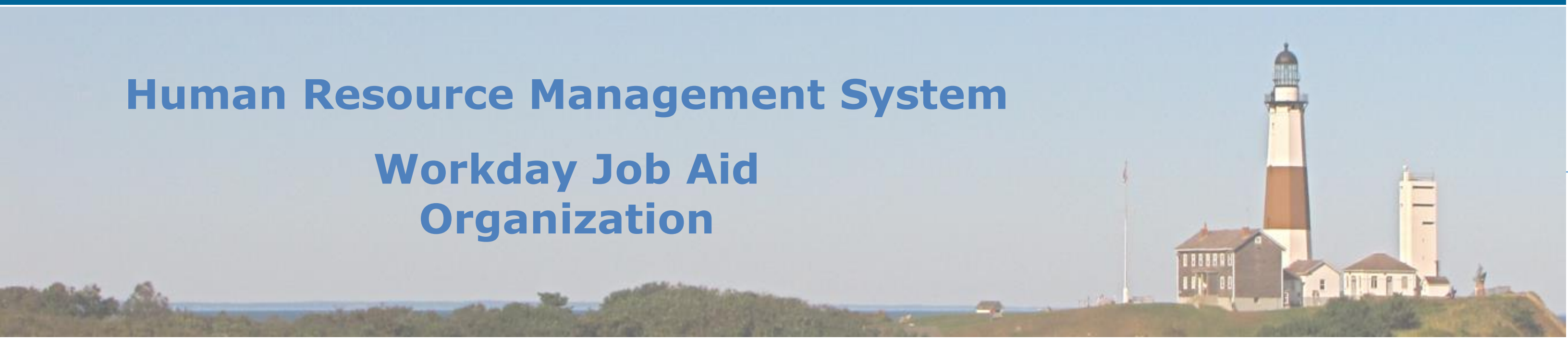
Here are the steps required to complete this task:

1. Enter the name of the supervisory organization in the search bar.
2. Click on the result and bring up the organization.
3. Click on the related **Actions** button
4. Hover over the **Organization** menu item and then click on **Change Organization Assignments**.
5. Enter the **Effective Date** if it differs from the date listed.
6. Click **OK**.
7. Update the items in the Override Organization Assignments as needed.
8. From the list at the bottom of the page select the employees that these changes are to be applied.
9. Click **Submit**.

## 8. Assign Matrix Organization

To assign a worker to a matrix organization, follow these steps.

1. Enter the name of the employee in the search bar.
2. Click on the result and bring up the employee.
3. Click on the related **Actions** button
4. Hover over the **Organization** menu item and then click on **Assign Matrix Organization**.
5. Enter the **Effective Date**.
6. Select the worker.
7. Click **OK**.
8. Select the **Matrix Organization** from the list provided.
9. Click **Submit**.



## 9. Remove From Matrix Organization

To remove an employee from a matrix organization, follow these steps:

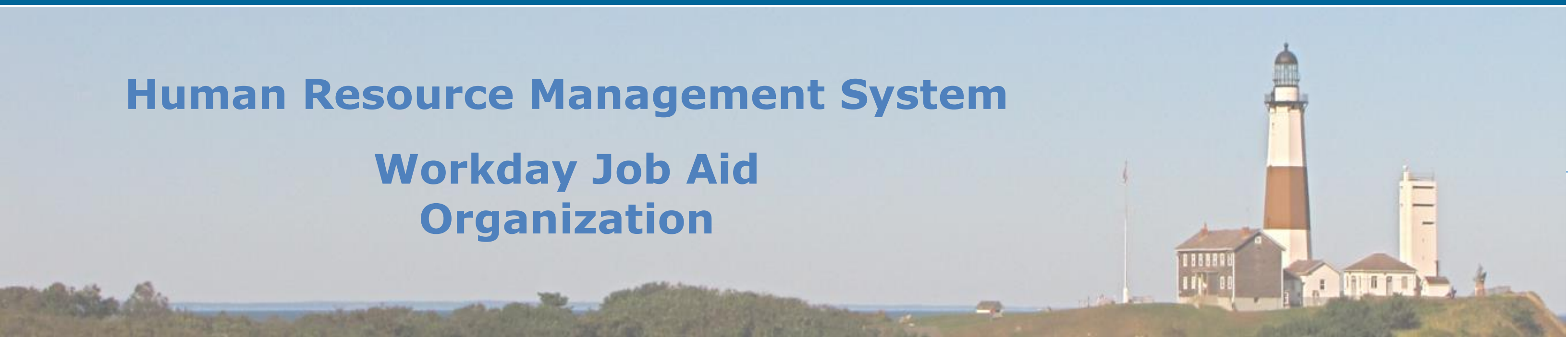
1. In the Workday Search bar enter "rem mat mem".
2. Click on the **Remove Matrix Member** task in the results returned.
3. Enter the **Effective Date** of the change.

**Note:** When possible, make the beginning of a pay period the effect date to remove a member from a matrix.

4. Select the **Matrix Organization** to remove the employee from.
5. Click **OK**.
6. Select the worker that is being removed from the matrix.

**Note:** The **Position** field will auto-populate based on the worker selected.

7. Click **Submit**.



## 10. Promote Worker

There are times when a worker is promoted to a new role. When that situation, arises the promotion needs to be reflected in Workday.

Here are the steps to promote an employee:

1. Enter the name of the employee in the search bar.
2. Click on the result and bring up the employee.
3. Click on the related **Actions** button
4. Hover over the **Job Change** menu item and then click on **Transfer, Promote or Change Job**.
5. On the Start page:
    a. Enter the date the promotion is to take effect.
    b. Select Promotion for why you are making this change.
    c. Click **Start**.
6. Work your way through the remaining sections updating all appropriate information (* indicates a required field).
7. Review information on the Summary page.
8. Click **Submit**.

**Note**: This will require the approval of the manager's manager, followed by the HR Partner.

## 11. Change Job

There are times when an employee seeks to change their current job. Either they wish to move to a different position on their current team, or perhaps seek to change the location of where they do their job. In either case, the **Change Job** task is used to make the necessary adjustments to an employee's record within Workday.

To change the job for a specific employee follow these steps.

1. Enter the name of the employee in the search bar.
2. Click on the result and bring up the employee.
3. Click on the related **Actions** button
4. Hover over the **Job Change** menu item and then click on **Transfer, Promote or Change Job**.
5. On the Start page:
    a. Enter the date the change is to take effect.
    b. Select the reason why you are making this change.
        i. Data Changes => Change Job Details or Change Location
        ii. Lateral Move => Move to Another Position on My Team
    c. Click **Start**.
6. Work your way through the remaining sections updating all appropriate information (* indicates a required field).
7. Review information on the Summary page.
8. Click **Submit**.

**Note**: This will require the approval of the manager's manager, followed by the HR Partner.

## 12. Transfer Worker

Situations may arise in which an employee will need to report to a different manager while serving in the same role. The **Transfer Worker** task is used to make the necessary adjustments to the employee's record within Workday to reflect the transfer.

To Transfer a specific employee follow these steps.

1. Enter the name of the employee in the search bar.
2. Click on the result and bring up the employee.
3. Click on the related **Actions** button
4. Hover over the **Job Change** menu item and then click on **Transfer, Promote or Change Job**.
5. On the Start page:
    a. Enter the date the change is to take effect.
    b. Select the reason why you are making this change.
        i. Transfer=>Move to Another Manager
    c. Click **Start**.
6. Work your way through the remaining sections updating all appropriate information (* indicates a required field).
7. Review information on the Summary page.
8. Click **Submit**.

**Note**: This will require the approval of the manager's manager, followed by the HR Partner.

## 13. Add Additional Job

There may be times when an employee will split their time between multiple jobs here at the County. Each of those jobs must be assigned to the employee in Workday. To accomplish this we must use the **Add Job** task.

Here are the steps to perform to add an additional job to an employee:

1. Enter the name of the employee in the search bar.
2. Click on the result and bring up the employee.
3. Click on the related **Actions** button
4. Hover over the **Job Change** menu item and then click on **Add Job**.
5. Confirm the correct Sup Org and Employee display.
6. Click **OK**.
7. Fill in all appropriate information (* indicates a required field).
8. Click **Submit**.
9. Click **Done**.

**Note**: This will require the approval of the manager's manager, followed by the HR Partner.

## 14. Change Visibility

**Warning:** Modifications using this feature could have major ramifications to the County Structure within Workday. Extreme caution should be taken when using this feature as it could cause loss of access to various Supervisory Organizations. It is recommended that before updating with this feature that the target Supervisory Organization should be first removed from the overall organization structure.

**Note:** This task can only be performed by an **HR Administrator**.

To Change Visibility for a specific Supervisory Organization, follow these steps.

1. Enter "org sum" in the search bar.
2. Click on the **Organization Summary** report.
3. Filter the **Organization Type** Column to list only "Supervisory".
4. Find the Organization to modify in the list provided and click on the three-dot icon next to the name. The **Actions** menu will appear.
5. Hover over the **Organization** menu item and then click on the **Change Visibility** sub menu item.
6. Review the **Current Organization Visibility** assignment.
7. Select the **Proposed Organization Visibility** from the list provided.
8. Enter an optional comment.
9. Click **Submit**.

| Change Log | | | | |
|---|---|---|---|---|
| Revision Number | Date of Change | Affected Lesson | Action | Initials |
| 1.1.1.1 | 09/15/2021 | | Log Created | RK |
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